



The Professionals' Choice

StarPM: Dashboard

The Star Standard Dashboard

Copyright

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Introduction

StarPM: Dashboard is a browser-based Business Intelligence (BI) reporting tool intended to provide easy access to any data from within the Star Practice Management database.

How much data a user can see is controlled by your organisation. A substantial library of data views is provided as standard: the Star Standard Dashboard.

Since every aspect of a Star Dashboard is configurable, from the availability of menus to the combination of components in any individual view—there is no 'default' configuration—Star provide the Star Standard Dashboard as a preconfigured example of just one potential Dashboard configuration.

Star Standard Dashboard

The pre-configured views in Star Standard Dashboard are based on Star's experience of providing browser-based reporting for its clients since the early 2000s.

These views can be adapted to suit your organisation's specific needs. Entirely custom views can also be created. Views can be amended or created either in consultation with Star or by any end user with the appropriate permissions, if training has been provided.

Accessing the Module

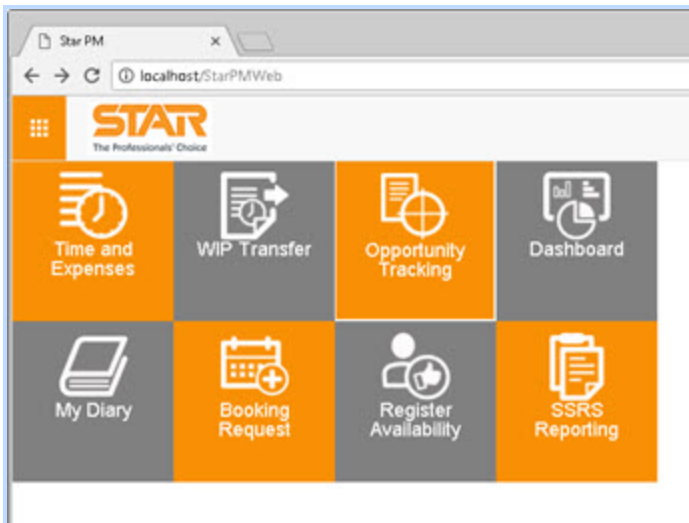
The following assumes that you are using the default StarPM Launcher. An alternative Launcher may be configured to display an alternative Dashboard, or none.

To access the StarPM: Dashboard module via the application menu:

1. Launch StarPM.
2. Click the menu icon to the left of the Star logo.



This toggles open the main menu:



3. Click **Dashboard**.

The StarPM: Dashboard module is displayed in a tab in a tab row beneath the title header.




Standard Dashboard Menu Bar

The Star Standard Dashboard menu bar presents the following options:

- **Home** - Displays a blank screen featuring only this menu bar.
- **Searches** - Provides a sub-menu of links to the following [search utilities](#):
 - **Clients**,
 - **Contacts**,
 - **Staff**, and
 - **Invoice**.
- **My Views** - Provides a sub-menu of links to the following pre-configured Dashboard views:
 - [My Home Page](#),
 - [My Financials](#),
 - [My Trends](#), and
 - [My Custom View](#).
- **WiP** - Displays a preconfigured [WiP](#) dashboard.
- **AR** - Displays a preconfigured [AR](#) dashboard.
- **Billings** - Displays a preconfigured [Billing Totals](#) dashboard.
- **Staff** - Displays a preconfigured [Staff](#) dashboard.
- **Metrics** - Displays a preconfigured [Metrics](#) dashboard.
- **Trends** - Provides a sub-menu of links to bar charts that illustrate each of the following trends:
 - **Billings** ([WiP Bills Raised](#)),
 - **Lockup** ([Current and Prior Year Lockup](#)),
 - **WiP** ([Firm WiP Trend](#)),
 - **AR** ([Firm AR Trend](#)), and
 - **Hours Posted** ([Hours Posted](#)).

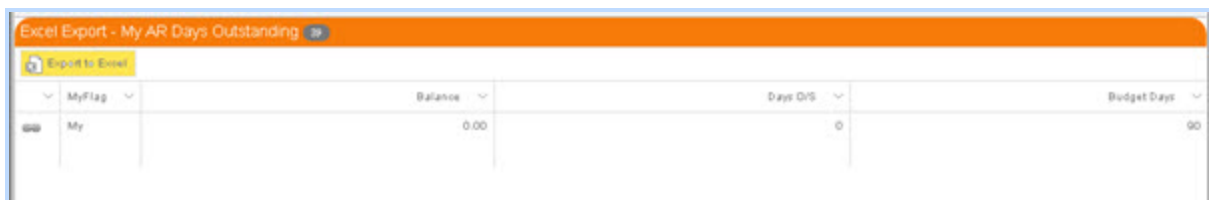
Headers and Toolbars

The orange header of each view in Star Standard Dashboard presents a combined title- and toolbar, which includes the following elements:

Component Label	Component ID	Zoom	Export to Microsoft Excel	Export as PDF File
My AR Days Outstanding	39			

The component label and component ID are read-only identifiers. The other elements are buttons with the following functions:

- **Zoom** - Displays the same view, expanded to full page width, in a new tab.
- **Export to Microsoft Excel** - Displays a preview of the view in Excel export format, with an **Export to Excel** button, in a new Excel Export tab.



Click the **Export to Excel** button to export the view to your default Downloads folder as a Microsoft Excel (.xlsx) file. The file name is comprised of the generic component type and the specific component ID separated by an underscore (_), e.g. Report_39.xlsx.

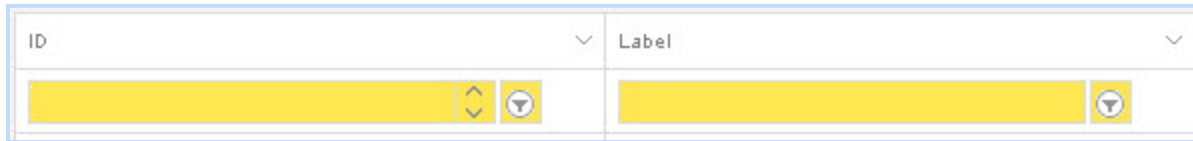
- **Export as PDF File** - Displays a preview of the view in PDF export format, with an **Export to PDF** button, in a new PDF Export tab.



Click the **Export to PDF** button to export the view to your default Downloads folder as an Adobe PDF (.pdf) file. The file name is comprised of the generic component type and the specific component ID separated by an underscore (_), e.g. Report_39.PDF

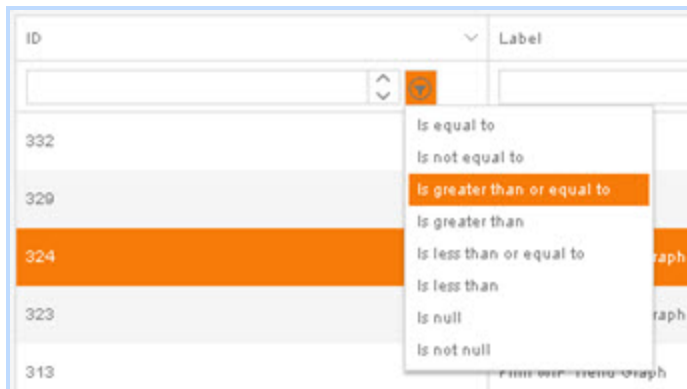
Column Filters and Page Navigation

Grid filters allow you to locate and select values quickly.



Filter Criteria

In any filter, first lick the drop down arrow and select a filter criterion:



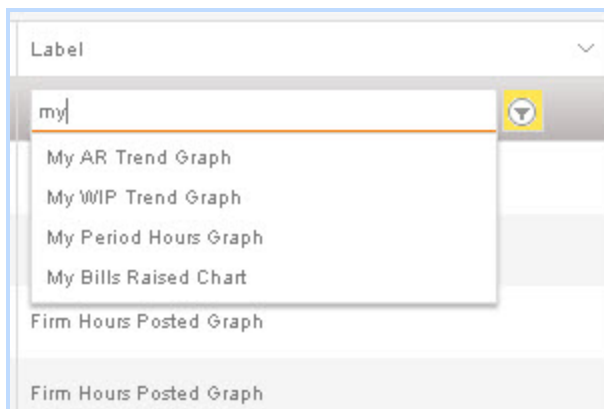
Only criteria appropriate to the column format, e.g. text or numeric are listed.

The default filter criterion is 'is equal to', so if you enter a value and press return without selecting an alternative criterion only exact matches will be returned.

Text Filters

As you type into the filter field on a text column, a drop-down within the filter control displays a preview of the filtered values, matching records with each character as you type (as in the screenshot below). Select the record you are searching for within the drop-down.

Do not press Return.



Numeric Filters

Numeric filters do not feature the as-you-type preview. Instead they feature a control that, once a numeric value has been entered, can be used to scroll the value up or down.



Clearing Filters

To clear a filter, simply click the X button displayed to the right of any active filter control.



Grid Footers

On the right, an indicator displays the range currently displayed of the total number of items matching the filter that have been returned by the filter.

1 - 21 of 21 items

On the left are navigation controls for use if the filter has not been applied, or has been applied and multiple pages of matching items were returned.

Filter Component List

ID	Label				
	filters				
202	Staff Groupings & Filters	Edit	Delete	Preview	Elements
163	AR Groupings & Filters	Edit	Delete	Preview	Elements
147	WIP Groupings & Filters	Edit	Delete	Preview	Elements

Grid footer: K < 1 > X 1 - 3 of 3 items

From left to right, the elements in the grid footer have the following functions:

Go to the first page / Go to the previous page / The current page / Go to the next page / Go to the last page.

Searches

The **Searches** option on the Star Standard Dashboard [menu bar](#) provides a sub-menu of links to a set of selectors, each of which allows you to search for specific records within the Data Pool.

Clients

To access the Client Selector:

- Select **Searches / Clients** in the [menu bar](#).

Home Searches My Views WIP AR Billings Staff Metrics Trends Hello

Client Selector (At least one selection must be made)

Client Ref	Client Name	Parent Client	Office	Partner	Manager	Credit Controller	Client Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<All>	<All>	<All>	<All>	<All>

Select Reset

Contacts

To access the Contact Selector:

- Select **Searches / Contacts** in the [menu bar](#)

Home Searches My Views WIP AR Billings Staff Metrics Trends Hello

Contact Selector

Contact Ref	Contact Name	Role	Contact Type	Client Associated With
<input type="text"/>	<input type="text"/>	<All>	<All>	<input type="text"/>

Select Reset

Staff

To access the Staff Selector, either:

- Select **Searches / Staff** in the [menu bar](#)

Home Searches My Views WIP AR Billings Staff Metrics Trends Hello

Staff Selector

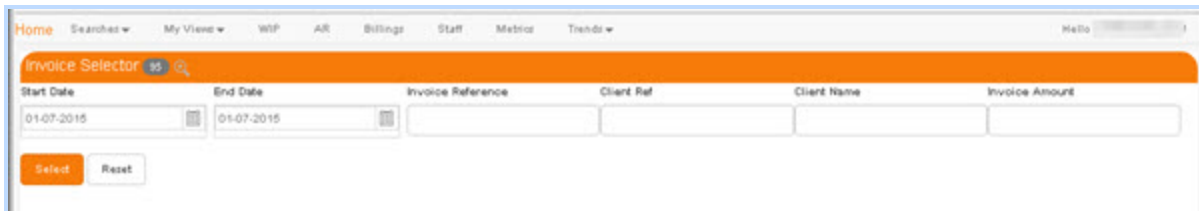
Reference	Forename	Surname	Staff Type	Job Title	Department	Office	Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<All>	<All>	<All>	<All>	<All>

Select Reset

Invoice

To access the Invoice Selector, either:

- Select **Searches / Invoice** in the [menu bar](#)



The screenshot shows the 'Invoice Selector' interface. At the top, there is a navigation menu with items: Home, Searches, My View, WSP, AR, Billings, Staff, Metrics, and Trends. Below the menu is a search bar containing 'Invoice Selector' and a magnifying glass icon. The main area contains a table with the following columns: Start Date, End Date, Invoice Reference, Client Ref, Client Name, and Invoice Amount. The Start Date and End Date fields are populated with '01-07-2015'. Below the table are two buttons: 'Select' and 'Reset'.

Start Date	End Date	Invoice Reference	Client Ref	Client Name	Invoice Amount
01-07-2015	01-07-2015				

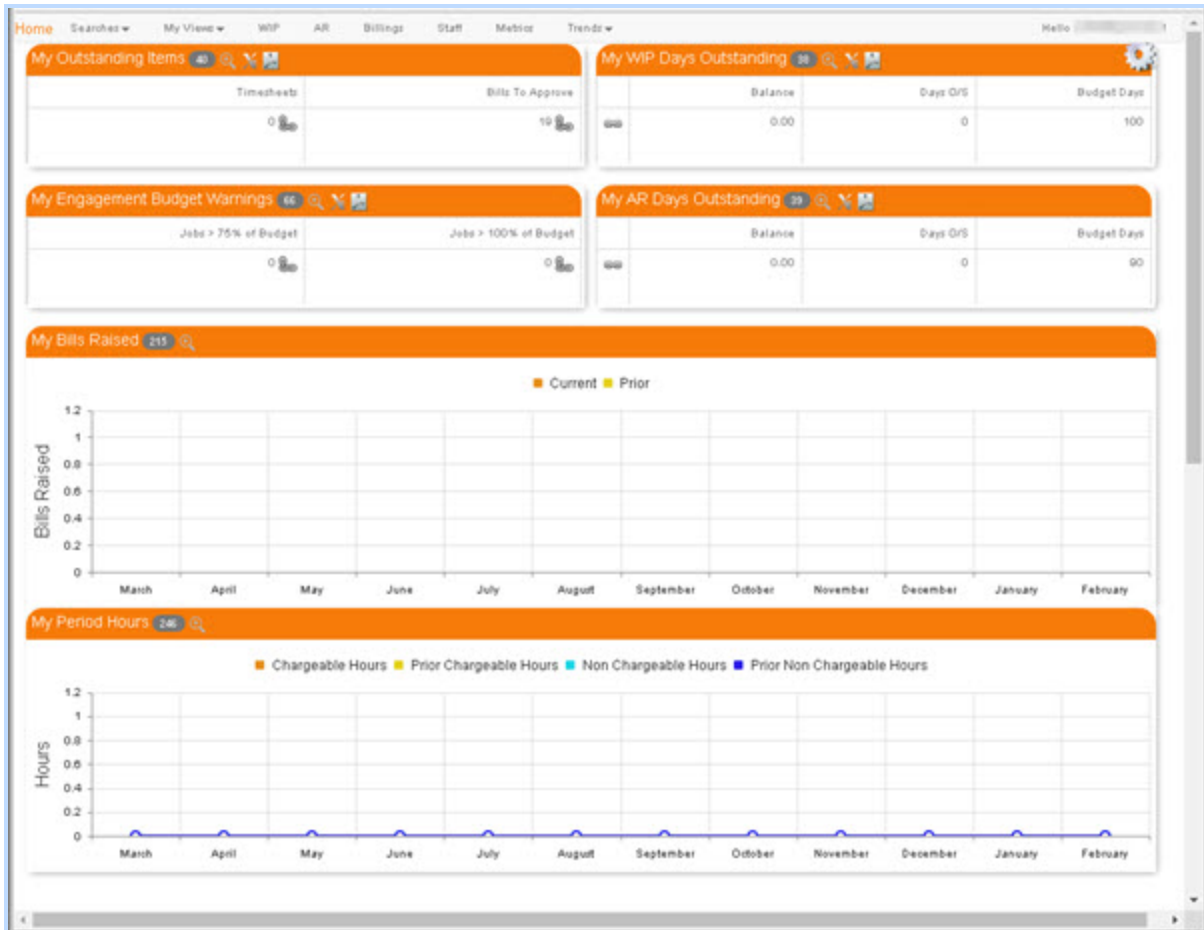
My Views

The **My Views** option on the Star Standard Dashboard [menu bar](#) provides a sub-menu of links to a set of dashboards, each of which groups together a specific grouping of components.

My Home Page

To access the My Home Page dashboard:

- Select **My Views / My Home Page** in the [menu bar](#)



My Financials

To access the My Financials dashboard:

- Select **My Views / My Financials** in the [menu bar](#)

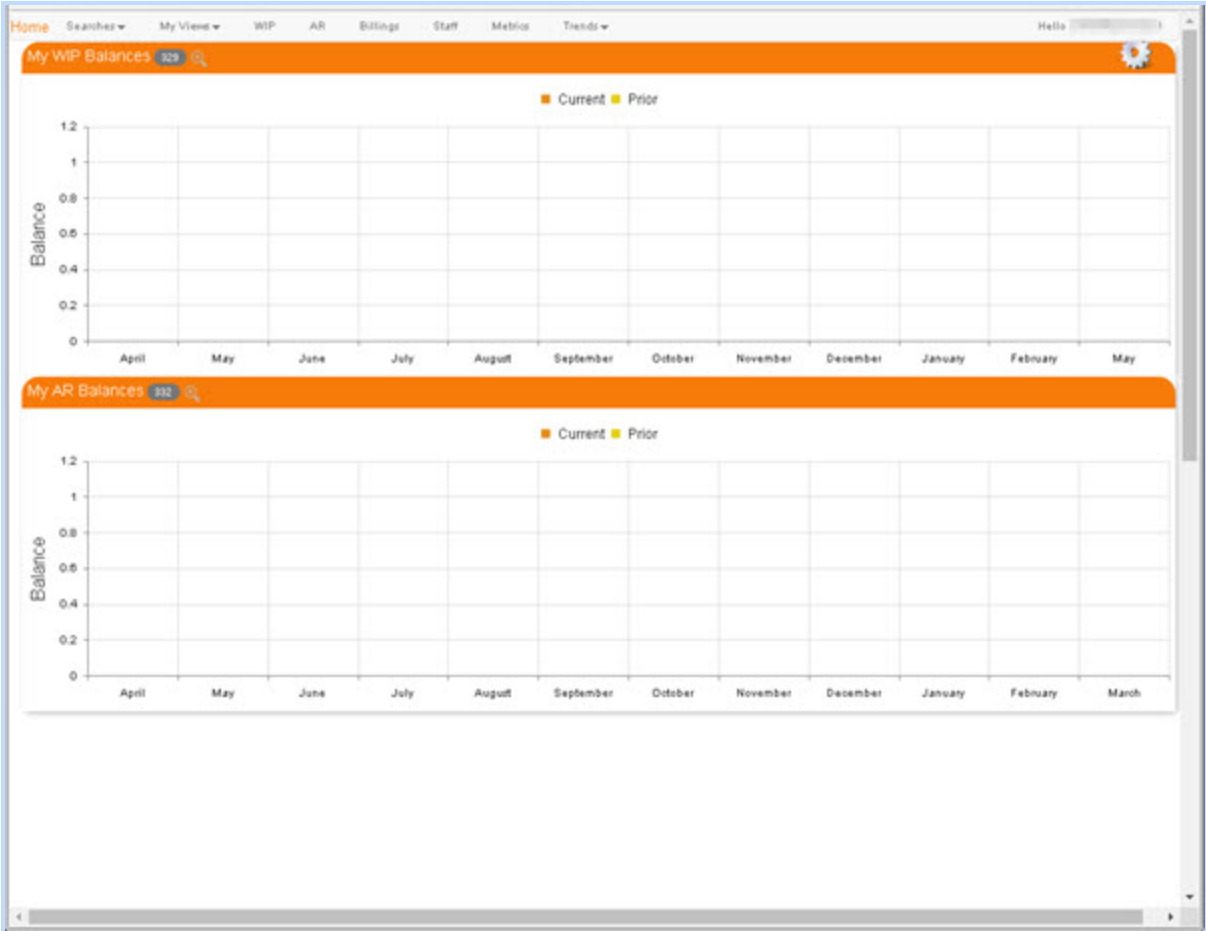
The screenshot displays a web browser window with the URL localhost/StarDashboard2/Dashboard/Render/18. The dashboard features a navigation menu with options like Home, Searched, My Views, WIP, AR, Billings, Staff, Metrics, and Trends. The main content area is divided into several sections:

- My Aged WIP**: A table with columns for Net Balance, Provisions, Gross Balance, and aging periods (0-30 Days, 31-60 Days, 61-90 Days, 91-120 Days, Over 120 Days), plus Progress Bills. All values are 0.00.
- My Aged AR**: A table with columns for Net Balance, Provisions, Gross Balance, and aging periods (0-30 Days, 31-60 Days, 61-90 Days, 91-120 Days, Over 121 Days), plus Unallocated Cash. All values are 0.00.
- My Realization**: A table with columns for Hours Billed, Time Billed, Expenses Billed, Other Billed, Total Billed, Allocated Billed, Recovery %, and Average Billing Rate. Data is shown for MTD and YTD, with all values at 0.00.
- My Production**: A table with columns for Hours, Time, Expenses, Total, Budget, and Variance.
- My Cash Received**: A table with columns for Yesterday, Week, Month, and Year. All values are 0.00.
- My Efficiency**: A table with columns for Chargeable Productive Hours, Chargeable Productive Value, Non Chargeable Productive Hours, Non Chargeable Productive Value, Non Chargeable Non Productive Hours, and Non Chargeable Non Prod. Data is shown for MTD and YTD, with all values at 0.00.

My Trends

To access the My Trends dashboard:

- Select **My Trends / My Home Page** in the [menu bar](#)



My Custom View

To access the My Custom View dashboard:

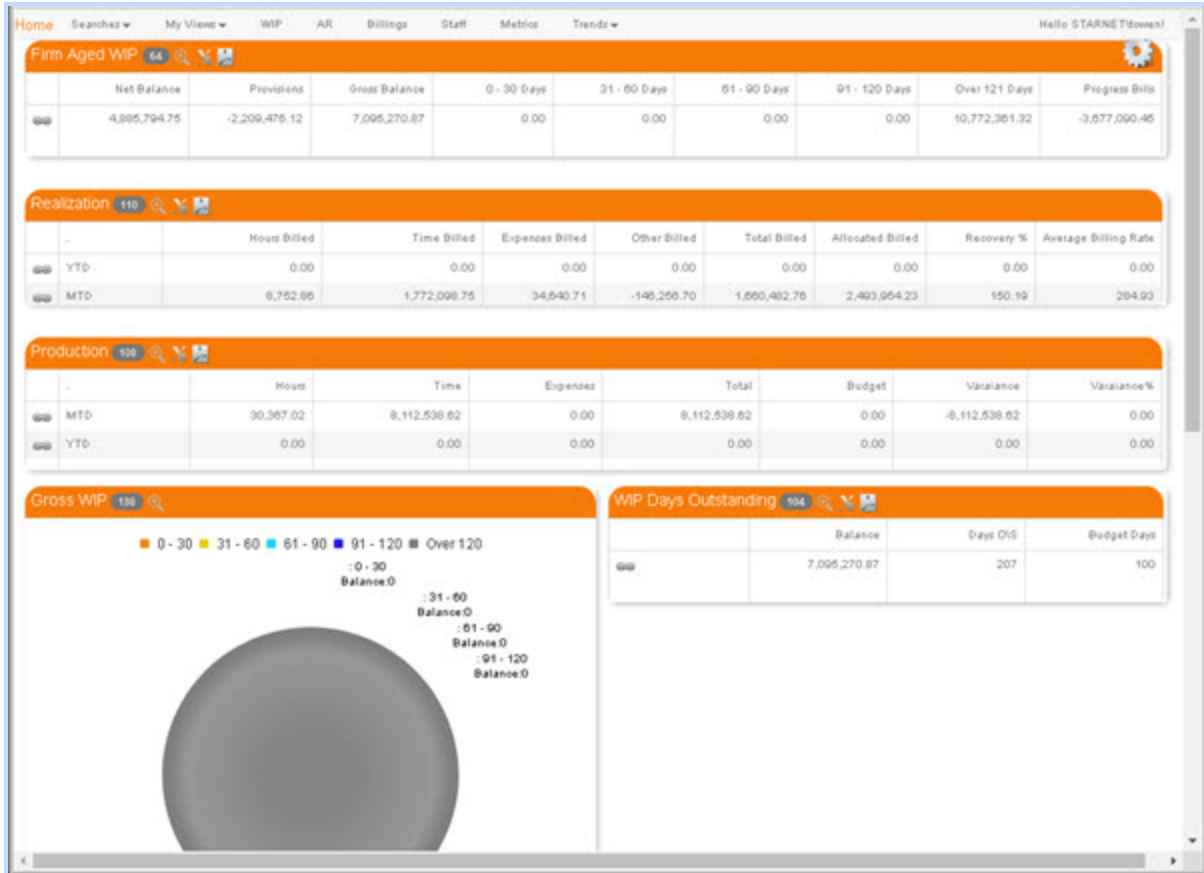
- Select **My Views / My Custom View** in the [menu bar](#)



WIP

To access the WIP dashboard:

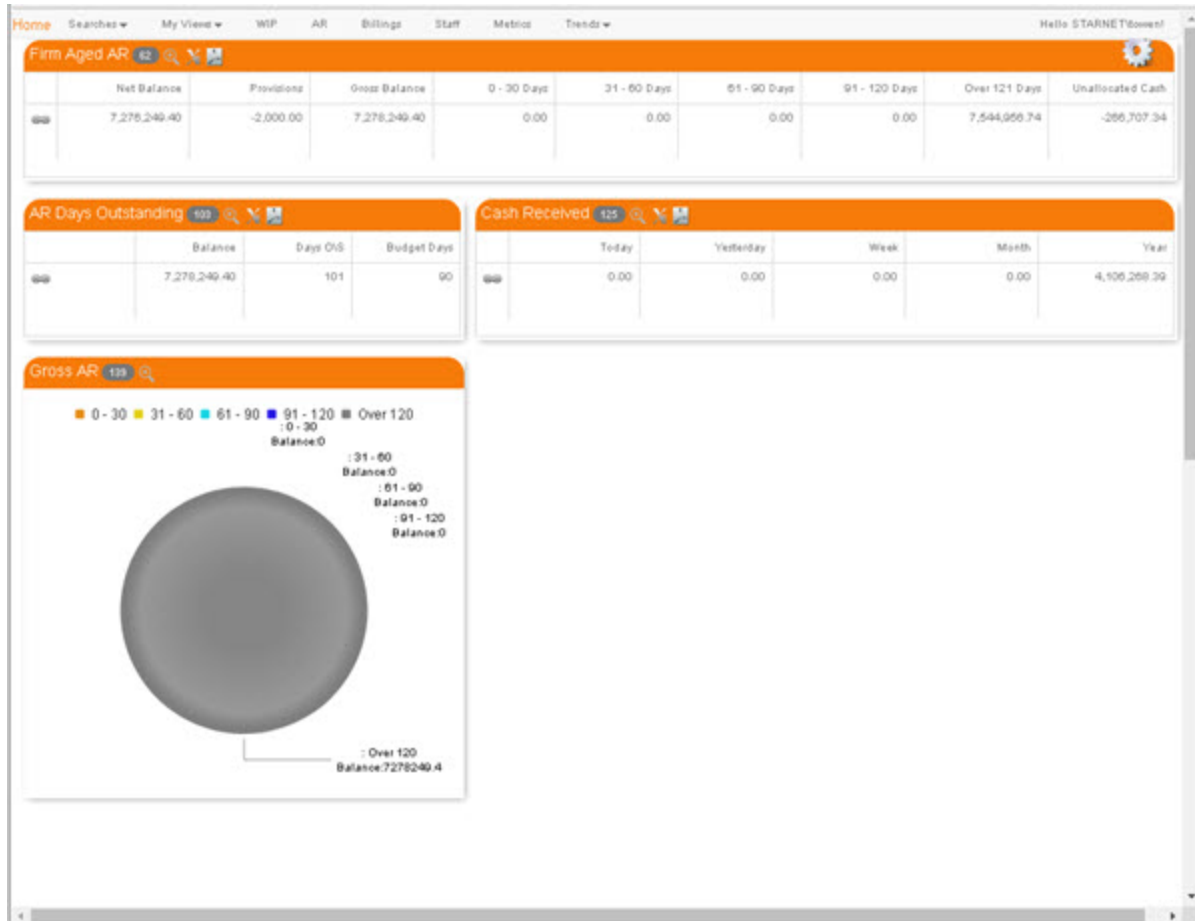
- Click **WIP** in the Star Standard Dashboard [menu bar](#)



AR

To access the AR dashboard:

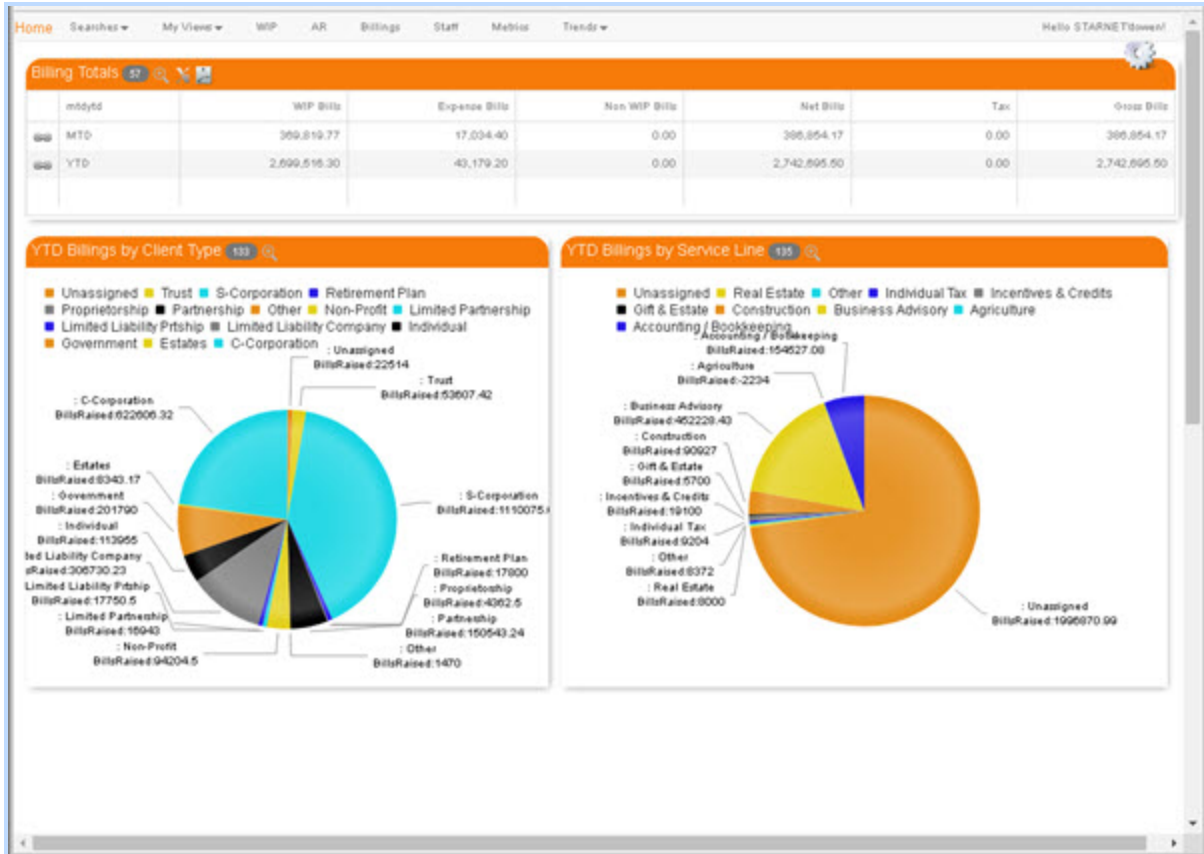
- Click **AR** in the Star Standard Dashboard [menu bar](#)



Billing Totals

To access the Billing Totals dashboard:

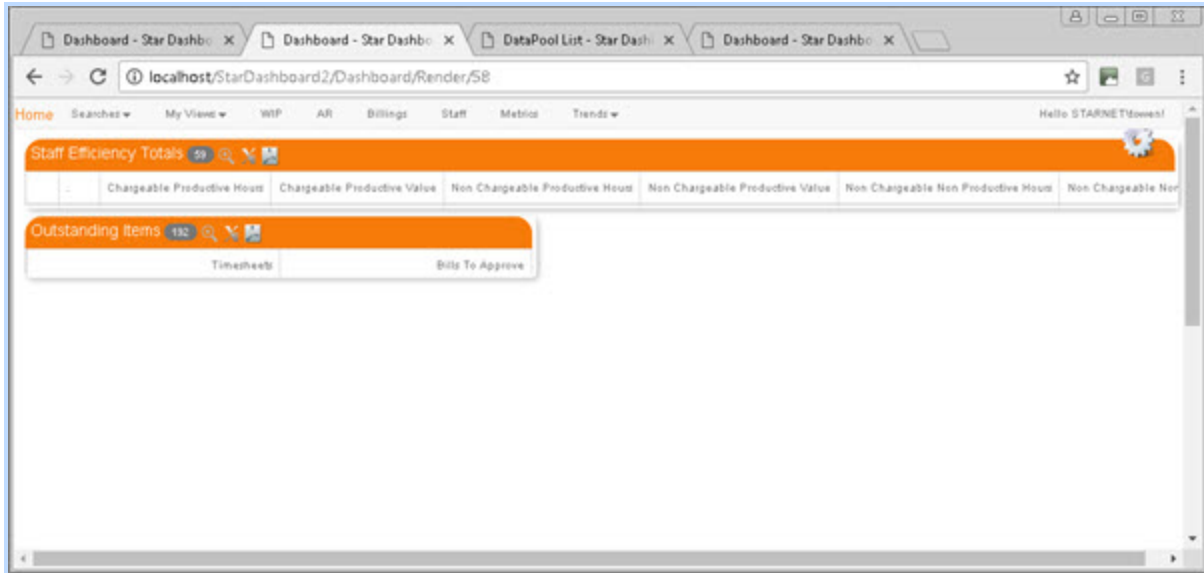
- Click **Billings** in the Star Standard Dashboard [menu bar](#)



Staff

To access the Staff dashboard:

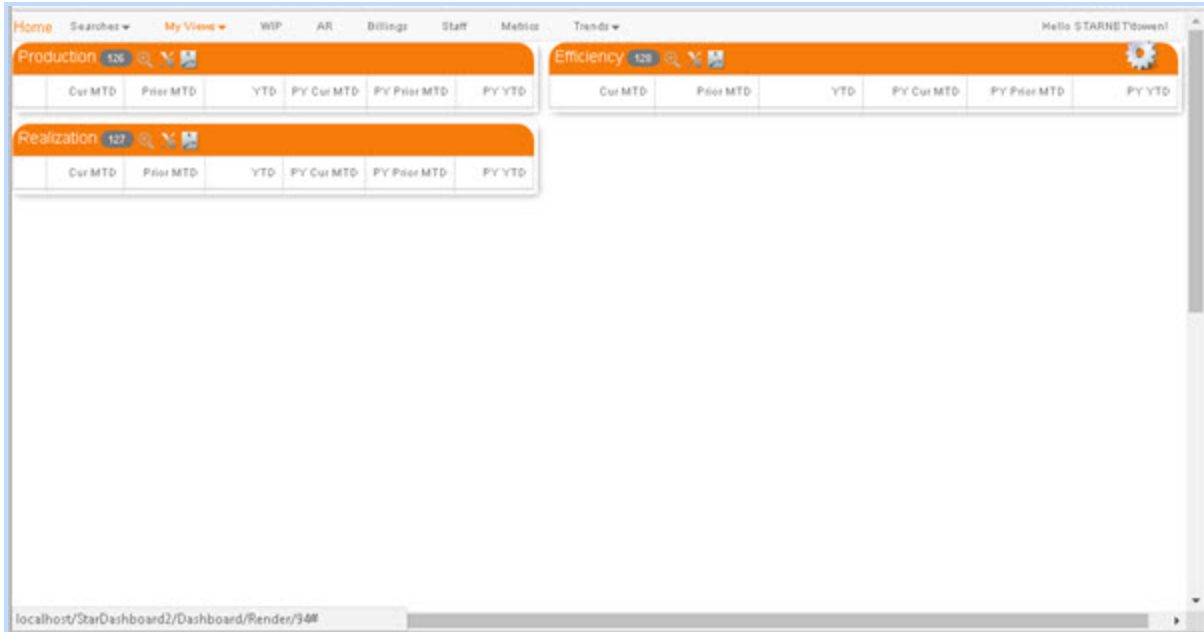
- Click **Staff** in the Star Standard Dashboard [menu bar](#)



Metrics

To access the Metrics dashboard:

- Click **Metrics** in the Star Standard Dashboard [menu bar](#)



Trends

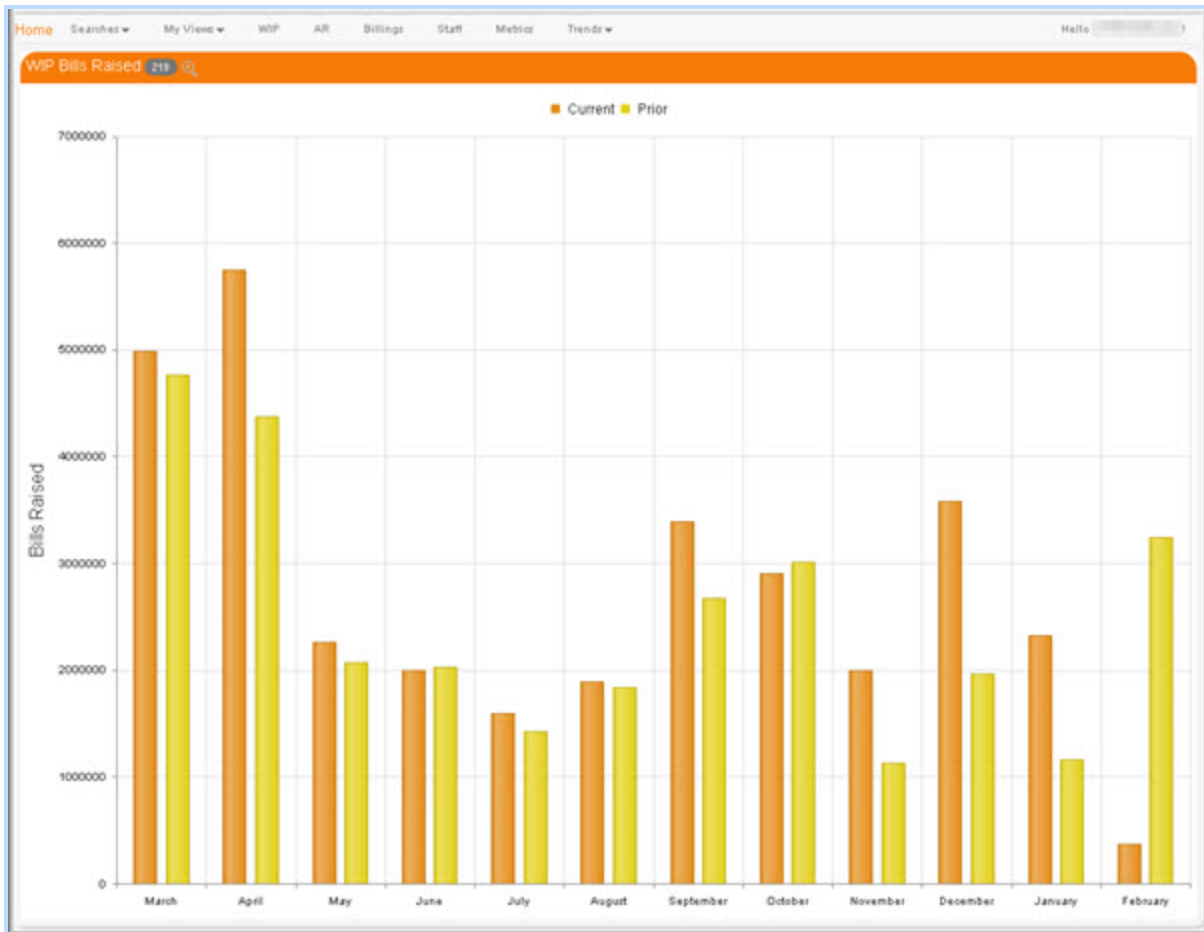
The **Trends** option on the Star Standard Dashboard [menu bar](#) provides a sub-menu of links to a set of bar charts, each of which illustrates a specific data trend.

WIP Bills Raised

Displays a bar chart depicting trends in WIP Billings over the past year.

To access the WIP Bills Raised view:

- Select **Trends / Billings** in the [menu bar](#)

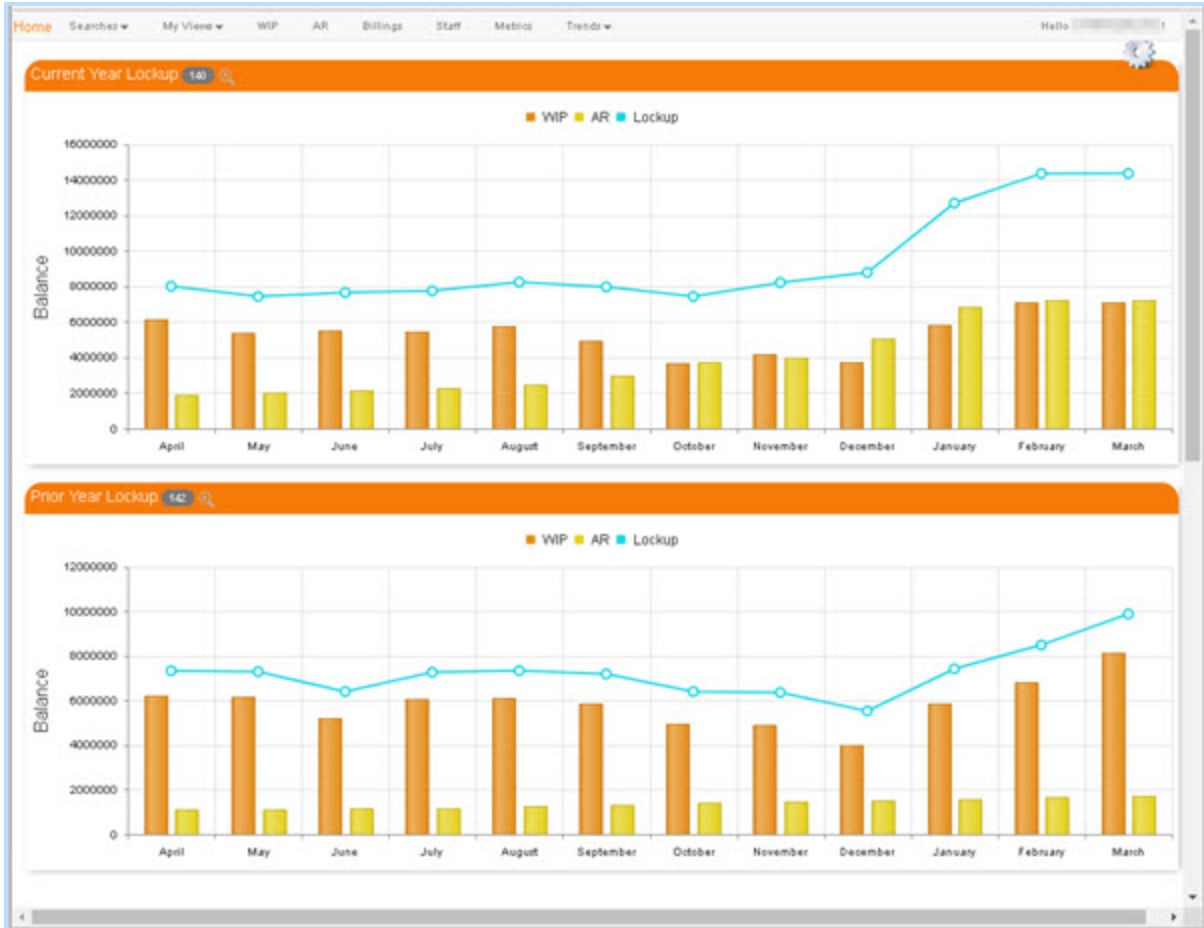


Lockup Trend

Displays bar charts depicting trends in annual lockup over the past and prior years.

To access the Current and Prior Year Lockup views:

- Select **Trends / Lockup** in the [menu bar](#)

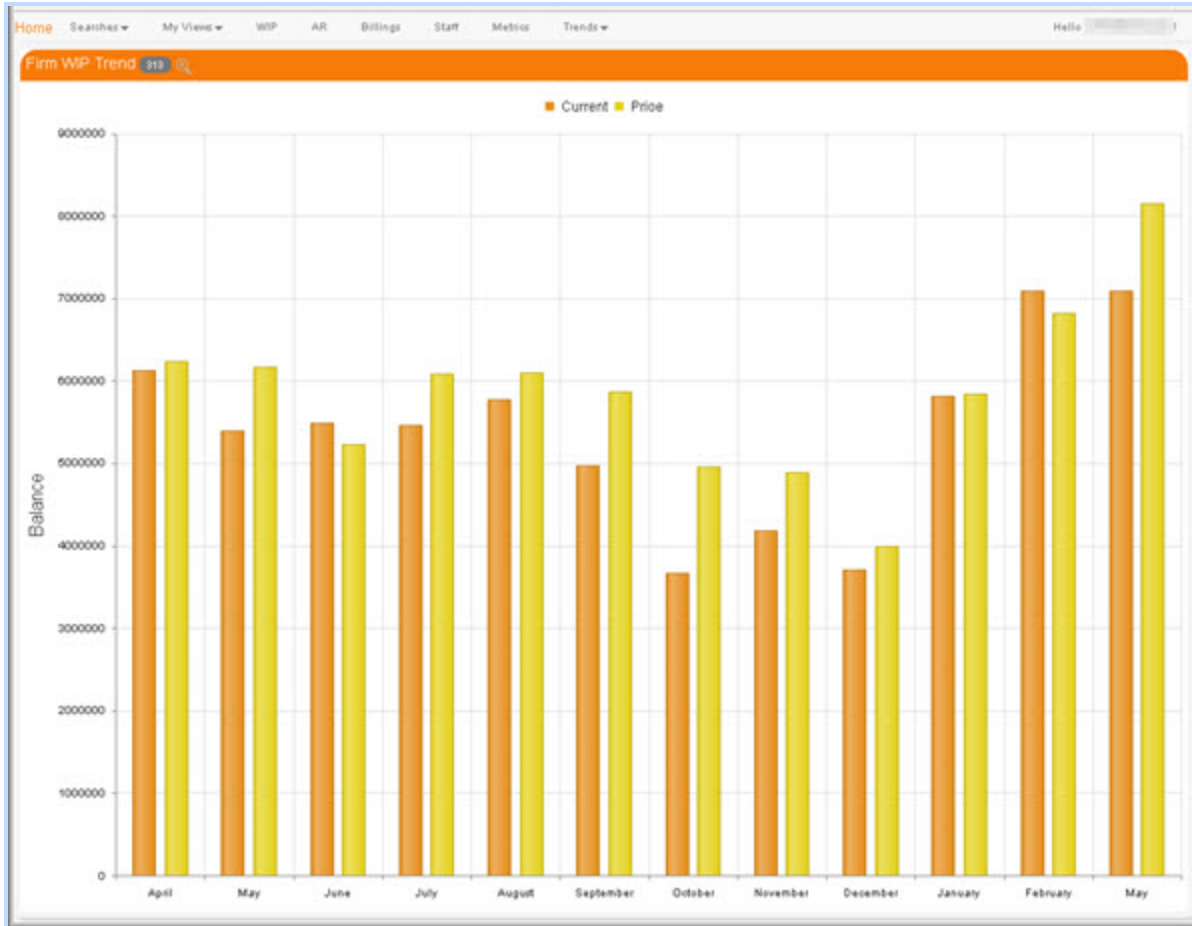


Firm WIP Trend

Displays a bar chart depicting trends in Firm WIP over the past year.

To access the Firm WIP Trend view:

- Select **Trends / WIP** in the [menu bar](#)

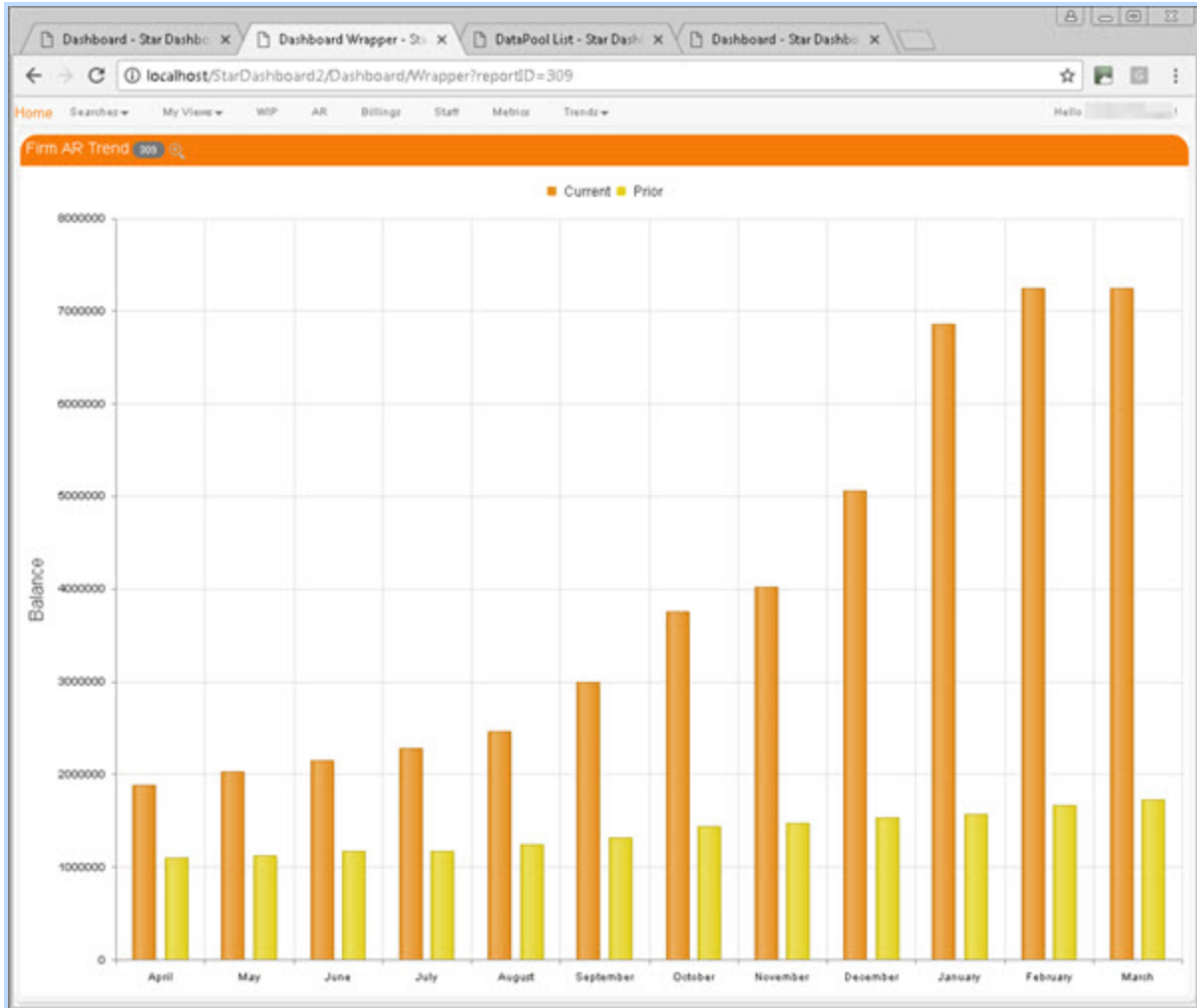


Firm AR Trend

Displays a bar chart depicting trends in AR over the past year.

To access the Firm AR Trend view:

- Select **Trends / AR** in the [menu bar](#)



Hours Posted

Displays a bar chart depicting trends in hours posted over the past year.

To access the Hours Posted view:

- Select **Trends / Hours Posted** in the [menu bar](#)

